

## Breaking Budget News.....

At press time, the Governor's FY 2003/2004 budget calls for the elimination of the Division of Tourism. The Governor's plan is the beginning of a lengthy process within the Legislature, culminating with the expected passage of the State of California budget in Summer 2003. More to follow as budget negotiations progress.

## California Conference on Tourism 2003

How do the actions of the Legislature affect the tourism industry? What types of events may increase tourism in rural areas? These topics and many more will be covered during the annual California Conference on Tourism March 23-26, 2003, at the Hilton San Diego Resort on Mission Bay.

Organized by the California Travel Industry Association (CalTIA) with the support of California Tourism, this year's conference promises a wealth of information.

Themed *California Tourism Redefined... Capture Our Share*, the

conference will kick off on Monday, March 24 with welcome remarks and a keynote address by Peter C. Yesawich, Managing Partner, Yesawich, Pepperdine & Brown, with an informative preview of emerging lifestyles and travel trends. Next on tap will be California Tourism's marketing presentation — a round-up of the State's program activities. After breaking for lunch, attendees will be able to choose from three concurrent sessions including *Internet... Lightening Speed Change*, a primer on how to capture your share of e-commerce; *The Yin and Yang of*

*Branding; or Travel Agencies — Today & Tomorrow*. During the *Travel Agencies — Today & Tomorrow* presentation, Anastasia Mann, Chairman, Corniche Travel Group, will moderate a panel of speakers discussing what the future holds for travel agencies. Partnership Marketplace — an opportunity to showcase products and services — will follow the afternoon session.

Day two will get a "jump start" with early morning Beach Olympics for those who like to clear the mind before settling in to some serious topics.

*continued on page 7*



## Internet Marketing Primer

By Bruce Clay  
President, Bruce Clay, LLC  
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*In the brick-and-mortar world we all live in, a common marketing slogan has been "location, location, location." As more people use the Internet, we find it becoming both more important and difficult to market our business in that new world. Since the Internet does not have any physical "location," many firms find that what worked before the Web fails on the Internet. Web marketing has become the realm of a new breed of tools, with the new king of the realm being Internet search engines, directories, and paid placement services.*

Virtually every study describing the behavior of an Internet user states that over 80 percent of all visitors to a Web site originate at a search engine, and that 80 percent of search engine traffic goes to the top 20 listings. In other words, if your Web site does not appear as one of the top results, you will receive very few visitors.

You have probably heard of Yahoo! and Google, and the rest of the search engine pack — where searching begins and Web site traffic originates. Unfortunately there are no published rules and no simple roadmaps on how to become well ranked in a search engine, and instead of competing with your neighbors, you are often

competing with the rest of the world. It is thus more important to understand the differences between a **Directory**, a **Search Index**, and a **Pay-per-Click** placement, and especially how to rank well in each, because they are vital to the success of your Web site.

Simply put, a **Directory** is a hierarchical structure where Web pages are categorized by theme, topic, and categories. It is much like a directory structure on your hard drive, where you deliberately put that last letter you wrote into a folder with a client's name on it. If you want the letter later, you have to know where to look. Yahoo! is the most important directory and they charge a fee to be

*continued on page 19*



By Caroline Beteta,  
Executive Director

California Travel and  
Tourism Commission

# 2002 Year-In-Review

*The year 2002 marked a most unusual time for the nation's travel industry. Still reeling from the terrorist events of September 11, California and other destinations were faced with completely rethinking their respective approaches to marketing and reaching cautious would-be travelers.*

California Tourism dramatically re-tooled its own efforts with an unprecedented strategic shift to market to in-state residents and nearby states, foregoing the customary national advertising plan. With traveler drive times doubling from four to eight hours, the strategy was based primarily on the premise that prospective travelers began using automobiles as their desired mode of transportation. Despite a very soft travel environment, California was one of only three states to experience a growth in domestic market share in 2001, due in large part to the in-state effort implemented in fall 2001.

With the continued support of our travel industry partners, California Tourism put together a host of successful and award-winning marketing activities and promotions in 2002. Following are highlights of those activities, which will be detailed in the 2002 Annual Report, due to be released in the first quarter of 2003.

## In-State/Western Regional Marketing and Advertising

In the first quarter of 2002, California Tourism continued with the in-state advertising effort by running "We're Californians," the 30-second television commercial featuring Jack Nicholson and Clint Eastwood that was part of the Governor's highly successful \$8 million tourism recovery initiative. The television component

was complemented by comprehensive newspaper and billboard campaigns, as well as radio ads that included 15-second retail tags from industry partners.

### Best of California Television Series:

The in-state campaign was also leveraged by the production of a 13-week television series entitled *Best of California*. The 30-minute episodes, underwritten by ARCO AM/PM, Amtrak, *Sunset* magazine and others, were a ground-breaking concept never attempted by a state destination marketing organization. The series proved very successful, reaching a total of 7.8 million adults in California during its run from March through September of 2002. Enhancing the television series was release of a *Best of California Driving Tours* guide, with a circulation of 500,000, which capitalized on the consumer trend of traveling by car.

### Modified Four-Market Advertising Campaign:

In May and June of 2002, California Tourism introduced a television and radio advertising campaign in Seattle, Portland, Phoenix and Las Vegas. Industry partners supported this campaign in the form of retail tags on the radio spots and through underwriting portions of the *Best of California* television series.

## Cooperative Marketing Programs

California Tourism's branding campaign gained additional mileage through a variety of cooperative programs,

including Wild Vacations in California, Culture California, California Cool Spots and Shop California.

**Wild Vacations:** Wild Vacations in California promotes statewide values and discounts to 23 million employees representing the largest Western-based U.S. companies. From January - August 2002, the [Wildvacations.com](http://www.wildvacations.com) Web site received 1.2 million page views, and participating attractions received more than 50,000 coupon redemptions that generated more than 25,000 room nights.

**Culture California:** Organized by California Tourism, the Culture California program launched a collaborative Web site ([www.culturecalifornia.com](http://www.culturecalifornia.com)) in 2002 and stepped up advertising efforts with an insert in *Smithsonian* magazine and a 30-minute episode on the *Best of California* series.

**California Cool Spots:** New for 2002 is California Cool Spots — an effort modeled after the highly-successful Fun Spots program. California Cool Spots is designed to encourage California winter travel and is supported by Mervyn's stores and the California Ski Industry. A total of 1.9 million Cool Spots discount cards were distributed throughout California and the Western U.S. in December and January to Mervyn's credit card customers.

**Shop California:** The Shop California cooperative program added exposure beyond the [ShopCalifornia.org](http://ShopCalifornia.org) Web

site with a series of promotional activities that included a partnership with Sony Entertainment's "Wheel of Fortune" game show, a leveraged media buy with the *American Express Travel Planner* and a new relationship with the tour operator, North America Journeys.

## Media Relations

**Trade Shows:** In 2002, California Tourism responded to hundreds of media inquiries at numerous trade shows such as ITB (Germany), World Travel Market (United Kingdom), Discover America International Pow Wow (Orlando), La Cumbre (Las Vegas), Society of America Travel Writers (Honolulu), and California Travel Market (San Francisco and Napa). California Travel Market alone generated a minimum of \$334,574 in direct ad equivalency media value.

**What's New:** *What's New In California*, a quarterly round-up release about new developments in California, is sent to nearly 3,000 domestic and international travel writers, editors and broadcasters. *What's New* items are routinely picked up by Associated Press (AP) going to 1,550 daily Associated Press outlets around the country that represent 98.8 percent of all U.S. dailies.

**California Finds:** The [CaliforniaFinds.com](http://CaliforniaFinds.com) Web site featured 1,200 special discount packages and received 145,000 visitor sessions (March-August 2002). The related media campaign generated a conservative \$450,000 of ad equivalency value for California Tourism.

**PR Offices:** Our international public relations offices were very active in 2002, with Kleber PR Network in Germany generating more than \$4 million dollars in media value,

Japan generating more than \$2 million (not including the successful YAPPARI California promotion), and First Public Relations in the United Kingdom generating nearly \$2 million in ad media value.

#### California Tourism Lead

**Generation:** California Tourism's Media Relations staff also responded directly to more than 1,100 inquiries in 2002 and conservatively generated a minimum of \$832,000 worth of domestic coverage for California. All efforts combined resulted in more than \$8 million worth of coverage for 2002.

#### Travel Trade Development

**National Tour Association (NTA):** Although California Tourism was fully engaged on numerous travel trade fronts, the highlight domestically in 2002 was California Tourism's major sponsorship and participation in the NTA annual convention held in Los Angeles. California Tourism's principal responsibility was organizing seven pre- and post-familiarization tours. The nearly 200 tour participants represented record attendance from prior years.

**Familiarization Tours:** In addition to NTA activity, California Tourism also conducted more than 24 familiarization tours across the state in 2002.

#### International Trade Shows and Sales

**Missions:** Together with California Tourism and the international trade offices in the UK, Germany, Japan, Australia and Brazil, the travel trade program organized a California presence at more than 50 trade shows and sales missions in 20 countries in 2002.

#### International Promotions:

Major international promotions carrying both a trade and consumer component were developed in 2002 including the German Railway "Taste of California" promotion, which reached 2 million train riders; and a "First Quench" California Wine promotion in the UK that included prominent tour operator partner, Thomas Cook Holidays. Other promotions also took place in Canada, Brazil, and the United Kingdom.

#### Major Promotions— The Big Ideas!

##### "Adventures in Wild California"

**IMAX Film:** Building on the \$30 million marketing endeavor, the IMAX film continued to play in more than a dozen international and domestic theaters in 2002, bringing the cumulative total to over 65 theaters on five continents with an audience of more than 4 million.

##### California Entertainment Network-

**Interactive Television:** California Tourism continued development on its five-year plan to launch interactive TV with exclusive California programming. The plan includes a second season of the *Best of California* television series and an interactive *Best of California* Web site that will feature show topics and bookable partner vacation packages. California Tourism is also pursuing interactive test programming with COX Communications on select cable stations in San Diego and Virginia.

#### Publications and Visitor Information

California Tourism produced a variety of trade and consumer publications to actively respond to travel-related inquiries. These included the *California Visitors Guide*, covering all areas of the state (550,000 distributed); *California Celebrations*, a

12-month special events publication (400,000 distributed); *Official State Map* (1 million copies distributed); *Travel Map and Handbook* (2 million distribution); and the California Driving Tours guide. Brand new for 2002 was a visitor publication for the UK that featured a UK-based fulfillment telephone number to make it easier for potential travelers to get information. California Tourism also develops and maintains the [visitcalifornia.com](http://visitcalifornia.com) Web site that experienced more than 2 million visitor sessions and 1 million unique visitors in 2002.

In total, cooperative/partnership contributions allowed California Tourism to leverage the \$14 million base budget to approximately \$20 million — effectively giving the destination of California more than \$34 million in direct marketing and promotional support for 2002. The additional funds allowed California to be competitive with other state destination marketing organizations.

For 2003, although we continue to face a challenging traveler environment with a significant State budget deficit, it is critical that we continue to move forward and promote California as a destination through leveraged partner opportunities. ★

## Call For Entries

The 2003 California Tourism Marketing Excellence Awards are quickly approaching, and the deadline to enter is March 3. A wide range of categories from print advertising to niche marketing are included, so gather up your best work and enter!

Winners will be chosen from semi-finalists at the California Conference on Tourism March 24-26, 2003 at the Hilton San Diego Resort on Mission Bay.

Look for information in the mail soon, or visit California Tourism's Web site ([www.visitcalifornia.com](http://www.visitcalifornia.com)) for an entry form. Once there, click on "Travel Industry." For further information, contact Sue Coyle, Tourism Award Coordinator, at [scoyle@cttc1.com](mailto:scoyle@cttc1.com) or (916) 446-8882. ★



As the summer travel season drew to a close, activity levels at California Tourism's Web site ([visitcalifornia.com](http://visitcalifornia.com)) decreased slightly. During the fall months, the site hosted a total of 533,664 user sessions\*, reflecting a decrease of 6 percent over the previous quarter (June, July and August).

Following are some points of interest for the period including September, October and November 2002.

- \* **Unique Visitors Abound:** The State site saw 229, 884 unique visitors\*\* during the reporting period. Nearly 1 million unique visitors have visited California Tourism's site to date in 2002.
- \* **"Surfing" California:** All those California-focused Web surfers checked out a number of pages during their visit. The site logged a total of 1.7 million page views during the reporting period.
- \* **Top Search Engines That Delivered:** Top search engines referring to California Tourism's site are: Microsoft Network, Google, Yahoo!, AOL Netfind and Lycos.
- \* **What's in a Word?** The most popular words or phrases used to search for California Tourism's site are: California, California map, map of California, California tourism and California travel.
- \* **Hits:** The site logged a total of 12.8 million hits during the reporting period, reflecting an average of 4.3 million hits\*\*\* per month. To date in 2003, hits total 57.4 million.

\* A *user session* is the number of distinct people who visit the site. This is estimated by grouping together all hits from one Internet provider address, with no more than 30 minutes between each hit, into one user session.

\*\* *Unique visitors* are counted by using the visitor's IP address, domain name or cookie.

\*\*\* A *hit* represents the number of individual requests a server receives to render a web page viewable. Each image on a page counts as one request. A visit to a Web page with three images will count as four hits — one for the download of the page file, and three hits for the images.



## News from the California Travel and Tourism Commission

### October 2002 Marketing Committee and Commission Meetings

The Marketing Committee gathered in Indian Wells on October 16, 2002 for a full-day meeting. On October 17, the California Travel and Tourism Commission (CTTC) Executive Committee met, followed by an all-day meeting of the Commission. Following are key highlights of these meetings:

- **Update on State Budget:** Marketing Committee and Commission members were told that the State budget was signed after the last Commission meeting, and that although the California Technology, Trade and Commerce Agency's budget sustained a significant 30 percent reduction, the Division of Tourism's budget was not cut. However, further reductions to the state budget would be presented to the Legislature at the end of 2002 due to the multi-billion dollar deficit, and the Division of Tourism's budget would be potentially very vulnerable and subject to a funding cut.
- **Marketing Plan:** It was reported to Marketing Committee and Commission members that California Tourism had funds of \$300,000 that were unallocated. A recommendation was approved at the end of the meetings to allocate the funds to advertising, with any remaining funds to be considered for online-based marketing programs.
- **2003 Advertising Campaign**
  - **New Print Creative:** Print concepts that had been approved by the Advertising Committee were presented. The three new ads – featuring California icons with beauty shots from San Diego, Napa Valley wine country and Los Angeles – continue the pattern of highlighting different areas with each print campaign. Each ad continues the creative evolution from prior campaigns and utilizes the established “Find Yourself Here” tagline. This new creative will run in tandem with the lighthearted “Doug” television commercial.
  - **2003 Advertising Campaign**
    - **Media Plan:** After analyzing the current travel environment where consumer confidence is still low, and considering California's advertising budget (which ideally would be millions higher), the Advertising Committee approved a budget-stretching plan to leverage cooperative opportunities and concentrate on media in the Western markets for the spring 2003 campaign. Along with television and the three new print ads, the *Best of California* television show will be leveraged with travel industry sponsorships, and a new Internet component will offer quick getaways and promotional opportunities.
  - **Update on The California Channel/Interactive TV (iTV) and “Best of California” Program:** The California Channel/Interactive TV Committee, formed to handle the overall management and development of the project, has continued with regular conference calls. It was reported that while further analysis of the satellite industry continues, current opportunities for California Tourism include continuing the *Best of California* TV series and a companion Web site. Meetings will soon take place with potential partner convention & visitor bureaus to get feedback on synergizing content for the new episodes and Web site. The 2003 series and Web site are scheduled to debut in March 2003, while the California Channel has a projected launch of 2005.
  - **“Adventures in Wild California” IMAX Film Update:** It was reported that the California IMAX film was

playing in 12 theaters internationally and domestically, and is scheduled to open at two theaters in Spain in early 2003. A promotional program with Black Diamond Films which includes screening of the film in six London IMAX theatres, is proceeding for February-March 2003, and includes promotional tie-ins with Nissan and local UK papers.

- **Cooperative Marketing Activities:** Updates were provided on the following cooperative programs that provide cost-effective means to build and expand the California brand:
  - **Golf California:** In The Loop Golf, Inc. is working with California Tourism on a new Web site and golf guide.
  - **Outdoor Recreation:** A new Web site that features a wealth of listings for outdoor activities will be up and running soon.
  - **Shop California:** Shop California secured a wedge on the game wheel of the nationally-aired *Wheel of Fortune* TV show, and the promotion was expected to run multiple times. Along with sponsor American Express, Shop California was also planning two educational forums for retailers and tourism professionals. One would be held in San Francisco in October 2002, and the other in north San Diego in February 2003.
  - **Dine California:** Dine California continues to offer free enrollment for all California restaurants on [www.dinecalifornia.org](http://www.dinecalifornia.org).
  - **Cultural Tourism:** The new Web site, [www.culturecalifornia.com](http://www.culturecalifornia.com), continues to grow in content. Cultural/arts/heritage-related businesses and organizations throughout California can post a free listing.



The new "California Cool Spots" card was distributed to 1.9 million Mervyn's credit card holders in December 2002 and January 2003.

## Marketing and Commission Meetings

The next meetings will take place in Monterey on the following dates: Marketing Committee and Assessed Business Reception on February 26, CTTC Executive Committee and full Commission on February 27, 2003.

## Assessment Revenues

The first mailing of the 2002-2003 cycle has generated assessment revenues of more than \$2.8 million. Distribution by industry segment remains consistent with prior years, with approximately 60 percent attributable to accommodations, 15 percent to restaurants and retail, 15 percent to transportation and travel services and 10 percent to attractions and recreation. The second mailing cycle for 2002-2003 will occur in January 2003. For the entire year, forms will have been sent to approximately 16,000 business locations. The Assessment Program expects revenues for the 2002 - 2003 year to top last year's \$6.8 million.

## CTTC Educational Presentations

Since the last *Insights* issue, the CTTC delivered educational presentations to the following groups: San Diego

Convention and Visitors Bureau; Lake Elsinore Valley Chamber of Commerce, Economic Development Committee; Riverside County Cultural and Heritage Tourism Partnership; Shop California Retailers Forum; Arts Management Forum; and a variety of convention and visitor bureaus (CVB's) and their members across the state. Presentation topics included: the economic impact of tourism; California Tourism's competitive landscape among other domestic destinations; marketing shifts in response to September 11 and the economic slowdown; a highlight of 2002-2003 marketing programs, with emphasis on the advertising campaign; the *Best of California* television series; the new California Channel venture; urban and rural tourism promotion; and cooperative opportunities to partner with California Tourism.

CTTC educational presentations, in partnership with tourism-related associations and CVB's across the state, are conducted on an ongoing basis. To discover how to secure a presentation for your area or organization, or to receive more information about the CTTC's marketing programs, please call (415) 332-4450. ★

- **New Winter Fun Card:** California Tourism, in cooperation with Mervyn's department stores, distributed a new "California Cool Spots" value-added card to 1.9 million Mervyn's credit card holders in December in an effort to promote travel during the winter season. Participants include: Heavenly Lake Tahoe; Northstar at Tahoe; Sierra at Tahoe; California State Railroad Museum; Best Western Hotels; Amtrak; Hornblower Cruises; Winchester Mystery House; Knott's Berry Farm and Universal Studios Hollywood.

### • Other Marketing Activities and New Business:

- **CTTC Newsletter:** The CTTC newsletter, created to keep all state tourism-related businesses informed about California Tourism's current marketing programs and opportunities to get involved, continues to be distributed on a bi-monthly basis.
- **Outreach:** A team of field representatives continues to meet one-on-one with tourism businesses statewide to provide information on California Tourism's marketing programs

and cooperative opportunities. In the first four months, CTTC field representatives met with over 1,100 businesses and travel colleagues throughout the state.

### • Review of Financial and Marketing Activity Reports:

The Commission reviewed regular reports including: monthly financial statements, an update on assessment funds collected, and interim activity reports from California Tourism staff.

### • Audit Report:

PricewaterhouseCoopers reported that the audit was completed and California Tourism received a strong grade and unqualified report.

### • Commission Meeting Strategic Planning:

Commissioners and meeting attendees broke into five committees to develop goals and objectives for the new CTTC Strategic/Business Plan. Committees included: Revenue Enhancement; Committee/Meeting Structure & Participation; Legislative Outreach; Marketing Plan; and Industry Outreach. Notes and comments will be collected and committees will reconvene at the February 2003 meetings.



The Shop California Board of Directors, American Express and California Tourism hosted an educational forum for approximately 75 attendees on October 21 in San Francisco.



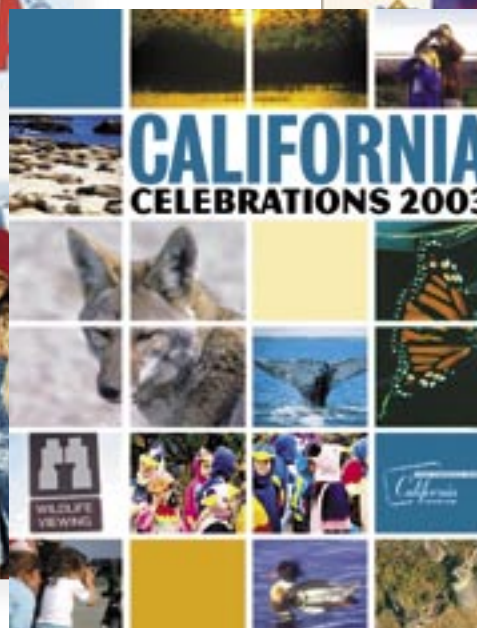
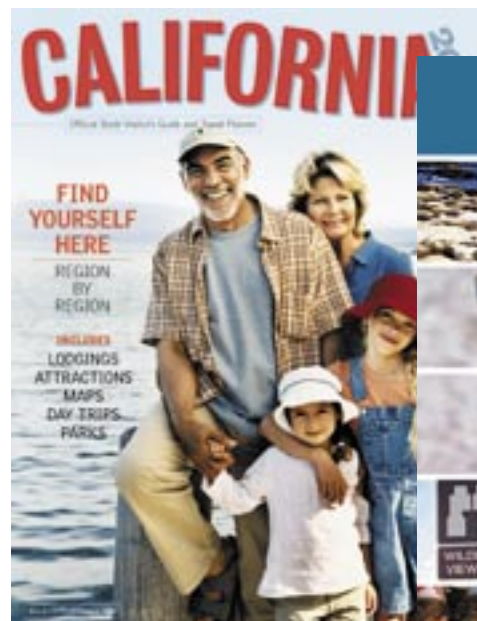
# California Publications

California Tourism just released its 2003 publications to make it easy for travelers to plan a quick weekend getaway or an extended tour.

The 2003 *California Visitor's Guide and Travel Planner* (CVG) contains special features, regional information and easy-to-read maps that help make travel planning a snap. From the sandy beaches of San Diego County to the snowcapped volcanoes of the Shasta Cascade, the state's 12 tourism regions are detailed and color-coded throughout the magazine. Vacation plans are made even easier with more than 2,500 listings including attractions, entertainment, accommodations, outdoor recreation, parks and public lands, top shopping areas and more. Produced by Sunset Custom Publishing (dba California Travel & Tourism Publications [CTTP]), the CVG has a circulation of 550,000 copies and is distributed worldwide. Listing information is also available at [www.visitcalifornia.com](http://www.visitcalifornia.com).

This year's cover of the *California 2003 Official State Map* speaks to the magical beauty of California's quiet spaces. Featuring a back road of the Eastern Sierra, this remarkable photograph was chosen to honor the late Galen Rowell — a renowned California photographer. Major sponsors of the *California Official State Map* include California Fun Spots and Ramada®. Produced by CTTP, the map has a circulation of 1 million with 550,000 copies bound into the *Visitor's Guide*. Remaining inventory is distributed in bulk to California Welcome Centers, convention and visitor bureaus, chambers of commerce, and travel professionals worldwide.

In recognition of the National Wildlife Refuge System Centennial, *California Celebrations 2003* highlights wildlife festivals and events throughout the state. From serene to wacky, *Celebrations* includes more than 1,200 event listings — including



Galen Rowell/Mountain Light

music festivals, ethnic parades, agricultural tributes, wildlife events, garden tours, historical reenactments, county fairs and more. Special icons make it easy to spot *Ethnic*, *Main Street*, *Stellar*, and *Top 100* events (as chosen by the American Bus Association) so travelers can always find an affair to their liking. For 2003, a special icon was also created to highlight all events involving wildlife viewing. Produced by California Tourism, the 48-page, full-color publication has a circulation of 400,000.

The *California Travel Map & Handbook Winter/Spring 2003* (CTMH) was released in late November. The 32-page, digest-size CTMH includes 17 full-color driving, metro and destination maps, and offers a variety of detailed information in an easy-to-use size. Features include a city index, mileage chart, advertiser discounts, California Welcome Center information, and additional information for attractions, visitor bureaus, public land agencies, and road conditions. CTMH is available at agricultural border inspection stations and California Welcome Centers, convention and visitor bureaus, and

chambers of commerce. Certified Folder Display Service handles additional distribution at major hotels, car rental offices and restaurants.

Advertising revenues underwrite the cost of all CTTP publications. For questions regarding advertising, please contact: California Travel & Tourism Publications, 950 South Coast Drive, Suite #290, Costa Mesa, CA 92626; telephone (714) 424-1989.

California Tourism publications are available by calling (800) 862-2543 or by ordering online at [www.visitcalifornia.com](http://www.visitcalifornia.com). ★

## Film Tours UK and Ireland

The Golden State will shine during a California Tourism-sponsored 12-city tour of the dynamic IMAX film, *Adventures in Wild California* in the UK and Ireland during February and March 2003. Featuring breathtaking imagery from all corners of California's diverse terrain, the film will be shown in Dublin, Belfast, Cardiff, Bristol, Bournemouth, Newcastle, Glasgow, Aberdeen, Edinburgh, Bradford, Manchester and Birmingham.

Tickets to four daily screenings will be free and distributed by request, by invitation or as giveaways through select radio stations and retailers.

Organized by Black Diamond Films, the promotion will include two daily screenings for schools that will be undertaking coursework and linking the film directly with their curricula; an evening showing targeted to the travel trade; and an evening screening aimed directly at consumers.

A number of film-related items will be given away as part of the promotion including 10,000 copies of the *Adventures in Wild California* DVD. The DVD also includes *The Making of Adventures in Wild California*, and excerpts from the *Best of California* television series. More than a dozen

California vacations — including air, hotel, car rental and admission to local attractions — will also be awarded in random drawings of those attending the film. Numerous product and media tie-ins have been arranged, and a special Web site ([www.wildcalifornia.co.uk](http://www.wildcalifornia.co.uk)) features information on the movie, film clips, sponsors, film tour schedules and a way for consumers to request tickets.

Additional sponsors of the IMAX tour include Extreme Sports Channel, Dogtag, Nissan, British Airways, the Inter-National Academy, and Kendal Jackson. ★

# New Logo *New Look*

The New Year brings a new look to California Tourism



First and foremost, a new logo is lending its look to all California Tourism correspondence and publications, and will provide a uniform branding identity. Designed by the Sacramento firm of Wallrich Landi, the new logo takes its inspiration from vintage postcards, luggage labels and other travel souvenirs whose imagery spans generations and cultures. Without confining the logo to specific settings or activities, the subtle combination of type and graphic forms evoke the warm, nostalgic memory of a California vacation. Its color palette — drawn from the state's traditional blue and gold hues — includes colors associated with sun, sand and water. California Tourism's advertising tagline (Find Yourself Here) has also been incorporated in the design to provide a stronger identity. Available in both color and black and white versions, the logo will be available in February for downloading by logging onto [visitcalifornia.com](http://visitcalifornia.com), along with complete standards of usage.

Beginning with this issue, *Insights* is featuring a fresh layout created to make the publication more inviting and easier to read, while the larger format provides more space for important industry news. For those who like to keep issues on file for

reference purposes, the publication will fit nicely in a legal-sized folder.

Got a comment on our new look? Reader comments are welcome at [CalTour@commerce.ca.gov](mailto:CalTour@commerce.ca.gov). ★

## California Conference on Tourism

*continued from page 1*

Breakfast roundtable discussions will cover how the Legislature and the Governor can alter the climate of the industry; how rural destinations are using cultural events to increase tourism; and a look at how shopping relates to the tourism industry. Next on the schedule is a general session with a special guest speaker, followed by another busy morning of concurrent breakout sessions. Tuesday sessions include *Market Intelligence for the New Millennium*; an encore presentation of *The Yin and Yang of Branding*; and ideas on how to capture your fair share of the lucrative sports market for your community with the *Wide World of Sports Marketing*. After lunch, an assembled panel of CEOs

including John Marks, President & CEO, San Francisco Convention & Visitors Bureau, Cynthia Harriss, President, The Disneyland Resorts; Larry Kurzweil, President & COO, Universal Studios, Chip Conley, CEO & Founder, Joie de Vivre; and Barbara Richardson, Executive Vice President, Amtrak will address the conference theme with *Capture Our Share*.

The conference will conclude Tuesday evening with the *Celebrate California Banquet* and presentation of the California Tourism Marketing Excellence Awards.

For registration information, visit the CalTIA Web site ([www.caltia.com](http://www.caltia.com)) or call (916) 443-3703. ★



The Internet continued to gain popularity last quarter when ordering California tourism publications. While calls to our toll-free number dropped compared to the same period last year, an equal number of additional requests for information were received on the Web site.

California Welcome Centers (CWCs) posted impressive attendance gains over the same period last year with Los Angeles numbers up more than 200 percent. CWC Oceanside posted the second highest gains with an increase of 73 percent.

Numbers below indicate select program activities from September through November 2002.

<b>Calls to toll free telephone number</b>	8,147
<b>Packets ordered on Web site</b>	16,377
<b>Packets sent from fulfillment house</b>	
Domestic	18,137
Canadian	914
International	2,350
Trade	461
Student	3,944
<b>Informational calls to California Tourism</b>	2,069
<b>Packets sent from California Tourism</b>	38
<b>E-mails to CalTour@commerce.ca.gov</b>	1,022
<b>Assessment calls</b>	790
<b>International contacts</b>	
Australia (Consumer & Trade)	199
Brazil (Consumer & Trade)	1,397
Germany (Consumer & Trade)	1,255
Japan (Consumer & Trade)	9,666
UK (Consumer & Trade)	892
Division of Tourism (Trade)	1,468
<b>Research</b>	
Contacts	75
Reports mailed	268
<b>Media relations inquiries</b>	
California Tourism office	260
Overseas offices	1,193
<b>California Welcome Centers (walk-ins)</b>	
CWC, Anderson	8,469
CWC, Arcata	4,109
CWC, Barstow	22,949
CWC, Los Angeles	16,115
CWC, Merced	10,078
CWC, Oceanside	12,863
CWC, Rohnert Park	7,900
CWC, San Francisco	83,258
CWC, Santa Ana	16,984
CWC, Yucca Valley	2,122

## World Giant Cedar Summit

The second World Giant Cedar Summit — a celebration of the importance of Japan's giant cedar trees and California's giant Sequoias as they relate to the environment and tourism — took place in November on Yaku Island in Japan. Only three sites on earth share the common ground of these giant trees: Yaku Island and Imaichi City, Japan; and the area in California encompassing Yosemite, and Sequoia and Kings Canyon National Parks.

With the support of California Tourism, Sequoia National Park Ranger, Mary Anne Carlton gave an informative presentation on how our Giant Sequoias are protected, preserved and enjoyed by visitors year-round. Through dramatic images and stories, Carlton also described the role of the National Park Service, and the attributes of controlled burning, which is now known to contribute to the regeneration of these natural treasures.

A brochure from ANA Hallo Tours, with an itinerary featuring Sequoia National Park, was also distributed to participants that provided an incentive to visit California. Other package tours will likely be created as a result of the Summit.

With top Japanese dignitaries attending, the Summit received impressive media exposure, and publicity value of broadcast alone is expected to top \$100,000. ★







## The latest news from California Tourism's travel trade and public relations representatives in Australia, Brazil, Germany, Japan, Mexico and the United Kingdom.

### Australia

Our Australia office reports that a major issue is the impact of terrorism on the desire of people to travel. Representative Leeanne Dyer says the impact of the bombings in Bali includes short-term cancellations and a major effect on some businesses. Great Adventure Holidays, a niche operator that had potential for a U.S.A. program, has closed its doors. With a main destination of Bali, the impact of the bombing forced them out of business. In November, a number of retail travel agencies surrendered their licenses and more problems are expected for operators who specialize in Southeast Asia. Dyer indicates that while most of the population outwardly indicates they will not let terrorists impact their travel plans, the reality seems to be that people are indeed making changes.

At press time, the entry of United Airlines into Chapter 11 bankruptcy was expected to reduce operations from the U.S. to Australia and New Zealand to two flights daily instead of three. Meanwhile, Dyer reports that in December, it was virtually impossible to obtain flights across the Pacific until February or March 2003.

Attendance at a November trade show offered an opportunity to meet with agents in areas difficult to get to during the year including many rural destinations. These agents advised that a continuing drought in Australia has had a major effect on their businesses, but that families in their regions still view California as a desirable destination. The exchange rate continues to be the main negative factor for people when it comes to their choice of destination.

In October, a press familiarization trip was planned in partnership with United Airlines and Walt Disney Parks and Resorts. Three freelance journalists from Queensland, Victoria and Canberra and an editor of the *Daily/Sunday Telegraph* in Sydney attended. The itinerary — which provided a number of fresh story angles — featured San Francisco, Anaheim/Orange County, Buena Park and Santa Monica.

### Brazil

News from Brazil is that the real reached a record low in September with a value of RS\$3.95 = \$1 U.S. — a drop of 41 percent since the beginning of 2002. Representative Newton Vieira says the financial front remains very fragile. The São Paulo Stock Exchange's benchmark Bovespa index buckled under the weight of slumping share prices on Wall Street and election jitters, falling to levels not seen in nearly four years. Plagued by hyperinflation in the 1980s, the country enjoyed eight years of relative stability after adopting a new currency (the real) in 1994. Prices are now a touchy subject, says Vieira, as Brazilians nervously watch annual inflation creep back toward double digits, due in large part to the real's fall against the dollar. The central bank is now forecasting 8.2 percent inflation for 2003—well above its target of 6.5 percent. In October, it surprised investors by raising its benchmark interest rate three percentage points to 21 percent.

The new government that took power in Brazil on January 1 expects a first year of “extreme difficulty” in managing Latin America's largest

economy, and intends to pursue a cautious course. Brazil will finish the year with an \$11 billion trade surplus — more than double what had been expected, and despite a recent surge in prices due largely to a strong dollar, the new government expects to be able to limit inflation to single digits next year. Since Luiz Inácio Lula da Silva's landslide victory, the real has recovered about 10 percent of its value against the dollar, but by December, values were slipping due to uncertainty about the composition of da Silva's cabinet, and when members would be named.

In other news:

- United Airlines announced the beginning of services between São Paulo and Washington D.C. The daily Boeing 767 service is replacing a temporarily suspended New York flight.
- Despite the state of the economy, Vieira sees opportunities for upscale clientele.

### Germany, Switzerland & Austria

Representative Martin Walter reports that Europe's largest economy is in crisis. The newly elected government is planning to cut spending and raise taxes in an effort to rein in a soaring budget deficit. With Germany teetering on the brink of its second recession in just over a year, there is an increasing sense of displeasure with those at the top. Prior to September's general election, modest growth was still expected this year, no tax increases were on the horizon, and experts were “certain” that the public deficit would keep within the European Union's 3 percent limit. As of November, all those situations had

reversed. In addition, a “nosedive” of economic activity in Germany in the first half of the year is expected by at least one major business forecaster. In other economic news, the unemployment rate is holding at 9.5 percent, while the dollar increased slightly against the euro. Slowing growth and rising unemployment have led to a collapse of tax revenues and a jump in welfare spending—creating huge gaps in budgets at both the federal and local level.

Other market news of interest:

- For summer 2003, thanks to the stronger euro, Dertur, Meier's Weltreisen and ADAC Reisen have cut long-haul prices by 5-15 percent, while European destinations are generally unchanged. There are also more early booking discounts and special offers.
- In an effort to generate extra sales, Neckermann Reisen, the main mass-market brand of German Thomas Cook, is offering vacations which can be paid by installments for summer 2003. Clients can pay a first installment 30 days after their holiday and spread the cost over six, nine or 12 months at an effective interest rate of 9.9 percent.
- Horst Opaschowski, Germany's most famous leisure analyst and travel expert, noted important changes in travel patterns at a recent conference in Wiesbaden. Opaschowski talked of a change towards letting oneself be pampered instead of seeking out the fun, adventurous and “happening” side of life. Quality of life at home has gained a higher status than a trip abroad, and the trend of the 1990s toward new experiences has passed its zenith. “The consumers are changing their ideas,” said



Opaschowski, “and many of them are now breathlessly bored of the fun culture.” Cuts in salaries were also cited as reasons to stick closer to home and put a stronger emphasis on visiting friends and family. Germans are also starting to prefer multiple short trips to nearby destinations instead of long vacations, and are placing a higher value on health and well-being. These trends mean tourism products within the field of wellness are estimated to have a huge growth potential.

German public relations representative, Birgitt Meinz, reports 262 California related media contacts from September through November. Highlights include organizing a number of individual press trips, including DSF Albenteuer und Reisen TV; golf and travel shows on N24 featuring Santa Barbara, Los Angeles and Palm Springs; and *Voxtours*, with a feature on California as a travel experience. In addition, Meinz’s office coordinated media receptions, editorial visits and media interviews for California Tourism’s Director of Communications, Fred Sater in Frankfurt, Hamburg, Vienna, Zurich, and Munich in October. Publicity value for the three-month period totaled \$812, 931.

## Japan

Representative Ko Ueno reports that Japanese overseas travel in September was up 22 percent over 2001, but still nearly 3 percent less than September 2000. Even though considerable recovery from 9/11 has occurred, consumer’s hesitation for overseas travel is still evident due to economic stagnation. The economy was a major factor as travelers avoided peak travel

season (July and August) in favor of September — when airfares become sharply lower. Other happenings during 2002 — such as World Cup Soccer (that caused people to stay home in July and August) and a “Golden Week” with an unfavorable combination of holidays and workdays — contributed to a travel decline.

On other economic fronts, Ueno reports that in September 2002 unemployment was at 5.4 percent, retail sales were down 2.9 percent, and travel sales were up 7.2 percent over the previous year. In October, the stock market (Nikkei) was down 15.7 percent over 2001, and 43.7 percent over fiscal year 2000.

Other market news:

- *Emerging gender and age group for overseas travel.* The greatest change in the first half of 2002 was the emergence of male travelers (ages 30-39) to the number one spot with a 12.66 percent share. Females, aged 20-29, dropped from the top position, but follow closely with a 12.63 percent share. The sharpest decline over the previous year was in the female, ages 20-24 group, which until last year had been the driving force of overseas travel. The drop in young female overseas travelers was attributed to a decrease in disposable income, while the increase in male travelers includes an increase of travel for business.
- *FIT is new direction.* The trend of Japanese visitors to the U.S. mainland is toward free individual travel (FIT). Wholesalers — such as Look JTB-Personal, NTA’s Best and others — have started to court these consumers with discount airfare and hotel accommodation packages.

From Tokyo, public relations representative Yoshihiro Fujii reports

the office has handled 396 California related inquiries from September through November. Highlights include the airing in November of ANB TV’s special that focused on on a 600-mile tour through California (the press trip took place in October), and a prominent feature in *Travel & Resort* magazine. The value of publicity generated in the three month period totaled \$12,849,999.

## Mexico

Francisco Caballero reports that the exchange rate has maintained a high level for the last three to four months at around 10.50 pesos = \$1 U.S. No changes are expected in the near future.

In airline news, passenger traffic to San Diego will increase as Aeromexico recently launched a weekly flight from Mexico City (via Mazatlan), and another twice-weekly flight from Mexico City (via Loreto). An all-inclusive Grand Plan package is offered by the airline on all flights. Caballero also says Mexicana would like to increase weekly flights to Sacramento, but is evaluating whether current load factors indicate sufficient demand.

Southern California destinations (San Diego, Los Angeles, and Ontario) are still the most popular spots for Mexican visitors, but other California destinations are low in package options.

## United Kingdom

Our London trade and public relations offices report that the UK’s sustained economic buoyancy has sustained several substantial setbacks from September through November. Uncertainty about the long-term

ability of the economy to continue its rapid rate of growth and low inflation has increased during this period. Although housing prices have increased an average of 25 percent in the last 12 months, forecasters are predicting that the growth of the housing market will soon cool, along with consumer confidence. Interest levels will increase, and consumers are expected to tighten their belts. Combined with the issue of international security and concerns about the Middle East, many analysts are predicting a long, hard winter for the government and population alike.

Public relations representative Phil Bloomfield says an ongoing trend towards independent travel and consumers using their increased buying power to leverage the best deals has been reflected in the travel media. California was being featured strongly as a good value and diverse alternative to East Coast destinations. Bloomfield reports a number of highlights including planning a three-week shoot in October for *Wish You Were Here*—one of the UK’s top national TV programs; executing a two-film shoot with *Scottish Passport*, Scotland’s top TV travel program; the airing of California footage on the BBC *National Lottery Jetset*; and handling all California media relations activities for World Travel Market in November. From September through November, Bloomfield reported 535 press contacts with a total value of publicity generated at \$980, 216. ★

## It's Easier to Navigate the State

The California Department of Transportation (CalTrans) has created a new system to make travel throughout California even easier. Exit numbers will now be added on all Golden State freeways in addition to exit names — making a drive through an unfamiliar area less stressful. Drivers will no longer wonder whether their exit is fast approaching because the numbering system provides clues to the distance. The system is also of help to international travelers, as numbers are understandable in virtually any language. Installation of the new signs has begun and is expected to be complete in two to three years. ★



Nathan Kendall/Squaw Valley Ski Corp.

## Squaw Valley Makes Top Five

When the November 2002 issue of *Skiing* magazine hit the stands, Squaw Valley USA was ranked among the top five ski resorts in the nation. In the annual resort survey, which ranks the Top 25 resorts, Squaw Valley was ranked #4 behind spots in British Columbia, Utah, and Wyoming. The survey — which included a tally of attributes and the opinions of magazine editors, contributors and some professional skiers — also ranked Squaw Valley #4 with regard to snow, #5 for steeps and #14 for nightlife. ★



Jason and Andrea Grossman of Mrs. Grossman's sticker factory in Petaluma enjoy their work day in the company of canine companions, Angus and Beau. From donations to charities to a dog-friendly workplace, this California company puts smiles on the faces of many.



Tom Lease

## Welcome Center Manager Moves to Main Street

Associate Tourism Specialist, Tom Lease bade farewell to California Tourism recently to head up the Technology, Trade and Commerce Agency's California Main Street program. In his new post as State Director, Lease oversees 38 designated Main Streets located throughout California.

In his 16 years with California Tourism, Lease served three administrations and was closely involved with domestic marketing, National Tour Association (NTA), rural marketing, California Fun Spots, cultural tourism, and management of the California Welcome Center (CWC) program. Under Lease's direction, the CWC program grew from its infancy to include 11 locations.

As Director of the State's Main Street program, Lease will be working closely on downtown revitalization with historic preservationists. ★

## Golden State Features More Diamonds

According to the Automobile Club of Southern California, 58 Southern California hotels and 28 restaurants have earned the prestigious AAA 2003 Four Diamond Award. Eight hotels joined Four Diamond ranks for the first time including: The Fairmont Miramar Hotel Santa Monica; Le Merigot, a J.W. Marriott Beach Hotel & Spa; Pechanga Resort & Casino; L'Auberge Del Mar Resort & Spa; Oak Creek Manor Luxury Bed & Breakfast; Cayucos Sunset Inn and the Santa Inez Inn. Aqua, a restaurant in Dana Point, also joined the elite ranks. Considered an extraordinary accomplishment for consistent levels of excellence, the award-winning properties are among the top 4 percent of more than 2,000 Southern California hotels, motels and restaurants. ★



The luxurious Santa Ynez Inn, located in the heart of Santa Barbara's wine country, is new to the list of Four Diamond properties in 2003.

## Stickers With a Heart

Mrs. Grossman's Sticker Factory first became involved with California Tourism last year when donating thousands of stickers to several New York area hospitals as part of the California Bear Hug program. But for more than a decade, the big-hearted company has been donating sticker "seconds" (which are so finely assembled that you would be hard pressed to find anything "second" about them) to medical teams who perform medical and dental work in third world countries, critically ill or disabled children in hospitals, and many other charities. In November, the company donated stickers to the Mustard Seed School for homeless children in the name of the California Technology, Trade and Commerce Agency as part of their donation program. While the colorful gifts would be welcome at any time of year, we are certain this donation brightened the holidays for many youngsters who needed it most. Thank you, Mrs. Grossman's! ★



# What's Ahead for Tourism?



LEGOLAND® California

*Tourism ups and downs: Total travel to and through California is forecast to decrease in the early months of 2003 after an expected strong fall 2002. Summer, however, is expected to see increases in total travel and overnight travel.*

## Gradual Growth on the Horizon

Travel volume in 2003 will be dependent on several factors. The economy as a whole, corporate earnings and subsequent travel budgets, consumer confidence in the stability of the economy, and geopolitical factors will all impact Americans' and Californians' interest in travel.

Macroeconomic Advisers, of Ernst & Young LLP, expects U.S. Gross Domestic Product growth "to strengthen to roughly 2.5 % in the first quarter of [2003], aided by a rebound in consumer spending and business capital spending. Growth over all of 2003 is projected at 3.3%, followed by 3.8% growth in 2004."<sup>1</sup> This increase will have a positive effect

on corporate earnings; however, the impact on business travel may not be felt right away. Businesses continue to reduce their expenditures on travel, preferring to utilize teleconferencing, videoconferencing, and other electronic meeting alternatives when feasible. The often-lengthy time spent in airports is also a factor in reducing business travel. Productive use of employee time is always an important issue.<sup>2</sup> A survey released by Merrill Lynch and the National Business Travel Association states that 63 percent of corporate travel managers believe that business travel will not return to 2000 levels until 2004.<sup>3</sup>

A Travel Industry Association of America (TIA) survey of air travelers in September 2002 showed that, when asked about business travel in the coming year, intentions are generally positive. More than one quarter of

*continued on page 12*

## U.S. and California Travel Volume

	JUN '02 (Millions of Person Trips)	JUN '01	% Change
<b>Total US Travel</b>	<b>248.0</b>	<b>245.7</b>	<b>0.9%</b>
Business	59.5	63.2	- 5.9%
Leisure	188.5	182.5	3.3%
<b>Total Travel To and Through CA</b>	<b>28.2</b>	<b>27.8</b>	<b>1.4%</b>
Business	7.7	8.4	- 8.3%
Leisure	20.4	19.4	5.2%
Residents	23.8	23.7	0.4%
Non-Residents	4.4	4.2	4.8%
<b>Total Overnight Travel To and Through CA</b>	<b>12.7</b>	<b>13.5</b>	<b>-5.9%</b>
Business	2.9	3.5	-17.1%
Leisure	9.8	10.0	-2.0%
Residents	8.6	9.6	-10.4%
Non-Residents	4.1	3.9	5.1%

Source: D.K. Shifflet & Associates

<sup>1</sup> *Business Economic Update*, Macroeconomic Advisers, LLC and Ernst & Young LLP, December 2002, p. 1.

<sup>2</sup> *Travel Industry Indicators*, James V. Cammisa, Jr., December 16, 2002.

<sup>3</sup> "New Survey Says Turnaround in Business Travel Isn't Imminent," *Travel Advance*, December 5, 2002.

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and click on "Travel Industry"





A strong close-to-home leisure travel market is expected to continue in the coming months.

## What's Ahead for Tourism?

*continued from page 11*

business air travelers (29%) thought they would travel more in 2003. Half (55%) thought they would travel the same amount. Reasons given for planning to travel less by air or not at all among business travelers included less need to travel or less business (52%), price/economy/budgets (19%), and lack of time or too busy (15%).<sup>4</sup>

Individuals in the TIA survey who traveled by air for pleasure in 2002 were asked their travel intentions for the next 12 months. Almost one-quarter (23%) plan to travel more in 2003, while 63 percent said they would travel the same amount, and 11 percent would travel less. The economy, price or budget was the reason given by one-third (33%) of those who intend to travel less in 2003. Less need for air travel or less visiting of friends and relatives was cited by 18 percent as the reason for fewer air trips.<sup>5</sup>

The strong close-to-home leisure travel market is expected to continue in the coming months, inhibiting the extent of the rebound of air and international travel according to James V. Cammisa, Jr. Consumers spent 9.2 percent more in 2002 for durable goods, preferring to put their dollars into automobiles, televisions and appliances rather than travel. Strengthening of the stock market will give potential travelers the economic resilience needed to put a larger share of their discretionary income into travel.<sup>6</sup>

A survey conducted for the American Automobile Association found that 71 percent of Americans plan to travel at least as much or more in 2003, and 60 percent believe the U.S. economy will be stronger next year than it is today. Putting their expected income where their sentiments lie, 78 percent stated they would spend as much or more on their longest vacation in 2003 as they did in 2002. Small percentages said they would spend less or a lot less (7% in each case).<sup>7</sup>

A very large percentage of affluent travelers surveyed by Conde Nast (89%) said they will travel as often in 2003 as they have in the past. Another four in five (81%) indicated that the current economy has had little or no impact on their travel plans. And nearly nine in 10 (88%) said that if there is a war with Iraq, it will have no effect on their travel plans.<sup>8</sup>

Registered attendees at the 2002 National Tour Association Convention (NTA) in Los Angeles were surveyed prior to the convention about the outlook for packaged travel in the state

<sup>4</sup> TIA/BTS Air Travel Survey Results, Travel Industry Association of America and the Bureau of Transportation Statistics, November 15, 2002, p.8.

<sup>5</sup> Op cit, p. A-6.

<sup>6</sup> Cammisa, op cit..

<sup>7</sup> "Most Americans Will Travel as Much or More Next Year," *Travel Advance*, December 20, 2002 .

<sup>8</sup> "Travel Spending of Affluent Moving Full Speed Ahead," by Art Pfenning, *Travel Weekly*, December 17, 2002.

## Winter – Summer 2003 Travel Forecast

	Winter** 2003F	Winter** 2003F/02 % Chg.	Spring** 2003F	Spring** 2003F/02 % Chg.	Summer** 2003F	Summer** 2003F/02 % Chg.
Total Travel to/through CA	75.9	-5.0%	80.2	-1.3%	95.6	3.6%
Business	21.1	-2.4%	24.1	-1.6%	21.4	1.8%
Leisure	54.8	-6.0%	56.2	-1.1%	74.2	4.1%
Residents	67.0	-4.5%	68.6	-0.7%	82.9	4.2%
Non-Residents	8.9	-9.0%	11.6	-4.6%	12.6	-0.3%
Average Expenditures* (ppd.)	\$75.30	1.9%	\$85.70	2.0%	\$74.70	2.1%
Total Overnight Travel to and through CA	28.6	-6.9%	33.4	-3.0%	44.4	2.0%
Business	7.1	-6.1%	9.3	-7.0%	9.1	-2.5%
Leisure	21.5	-7.1%	24.0	-1.3%	35.3	3.2%
Residents	21.8	-6.1%	23.3	-2.1%	32.9	2.9%
Non-Residents	6.9	-9.3%	10.1	-5.0%	11.5	-0.5%
Average Expenditures* (ppd.)	\$77.80	1.7%	\$87.70	1.5%	\$77.60	1.7%

F = forecast

All volume figures are in millions of Person-Trips. Expenditures are per person per day (ppd).

\* Excludes transportation expenditures.

\*\* Winter = December, January, February; Spring = March, April, May; Summer = June, July, August

This seasonal forecast from D.K. Shifflet & Associates reflects their enhanced seasonal forecasting method. The method, which is based on the ARIMA (Box-Jenkins) forecasting method, utilizes seasonal data from the past four years to advance the forecasting period through the present season and well into the future.

in 2003. Of those responding to the survey, 55 percent believed packaged travel in California will be higher in 2003 than in 2002. Nearly half (46%) expect 2003 will be better than 2002 with respect to Los Angeles packaged travel. Few believed 2003 tour levels will be worse than those of 2002.<sup>9</sup>

According to the latest seasonal forecast from TIA, travel by Americans will remain relatively flat this winter (December, January, and February). A minor increase of one half percent for the season is predicted.<sup>10</sup> This follows the record

national winter leisure travel season of 2002, when Americans rebounded from the low travel numbers of fall 2001. In terms of trends, shorter, close-to-home auto trips, fewer fare wars, and continued cruise and hotel discounts are predicted. TIA does not expect travel to return to 2001 levels until 2004.<sup>11</sup>

Total travel to and through California is forecast to show decreases in the early months of 2003 after an expected strong fall 2002. Overnight travel, a subset of the total travel picture,

is also expected to be lower in early 2003 than it was in early 2002. Spring 2003 travel is forecast to be steady or slightly lower than the same season in 2002, according to the most recent seasonal forecast from D.K. Shifflet & Associates. Business travel is also expected to continue lower than in

2002. Summer 2003 will see increases in total travel and most overnight travel. Total business travel levels will be higher, while overnight business travel volume will decrease compared to summer 2002.<sup>12</sup> ★

<sup>9</sup> Results of Pre-2002 NTA Convention Packaged Travel Survey, conducted by LA Inc. on behalf of California Tourism, December 23, 2002.

<sup>10</sup> "TIA Forecasts Flat Winter Season," Travel Industry Association, Press Room, [www.tia.org](http://www.tia.org), December 11, 2002.

<sup>11</sup> "All Bets Are Off," *Travel Advance*, December 23, 2002.

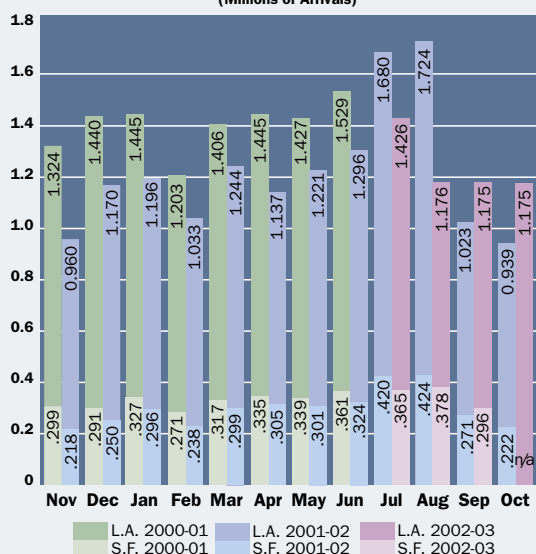
<sup>12</sup> "California, Summer 2002 - Summer 2003 Topline Projections," D.K. Shifflet & Associates, December 20, 2002.



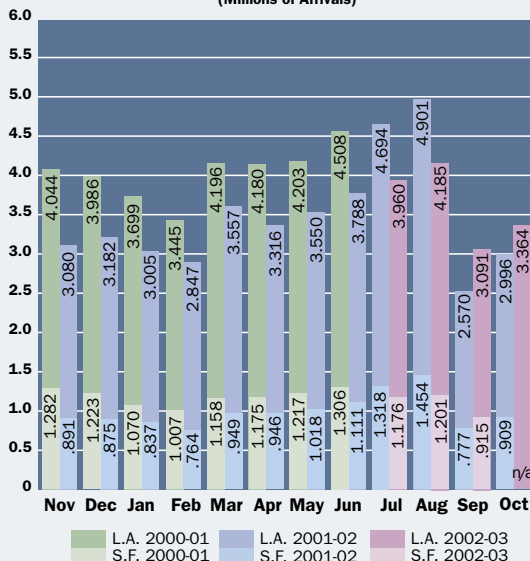
## Airport Arrivals

Sources: City of Los Angeles Dept. of Airports; SFO Bureau of Communications; San Diego Unified Port District Airport Operations Dept.; Oakland Airport Finance Office; Airport Finance and Administration, City of San Jose.

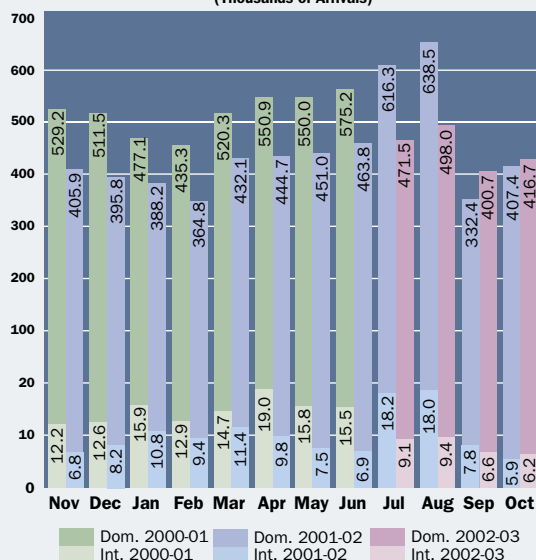
### International Air Arrivals Los Angeles - San Francisco



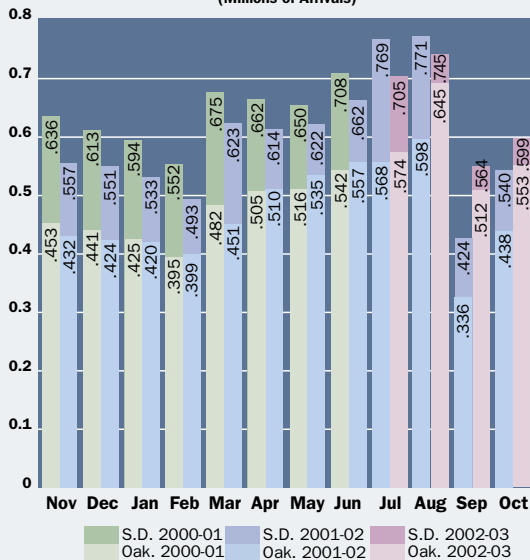
### Domestic Air Arrivals Los Angeles - San Francisco



### Domestic/International Air Arrivals San Jose



### Domestic Air Arrivals San Diego - Oakland



## Economic Significance of the Travel Industry

- Visitor spending on accommodations, food services, recreation and transportation in California totaled \$75.4 billion in 2001.
- Visitor spending supported 1.1 million jobs with earnings of \$25 billion in 2001. This means the travel industry is the third largest employer in the state, ranking behind Business services and Health services.
- Visitor spending contributed \$37.4 billion to the Gross State Product in 2000\*. The travel industry ranks 5th in this area. (1. Health services; 2. Misc. business services; 3. Information and data processing; 4. Engineering, architecture and other services).

Source: Dean Runyan Associates and the Federal Bureau of Economic Analysis.

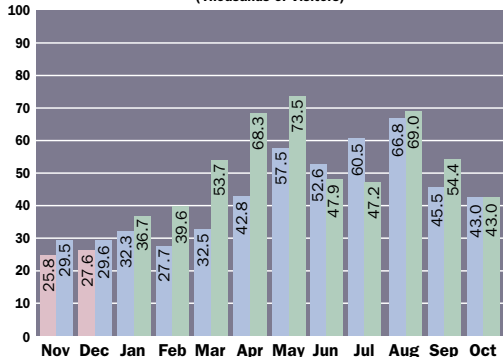
\* 2001 Gross State Product data is not yet available from the Federal Bureau of Economic Analysis.



# National Park Attendance

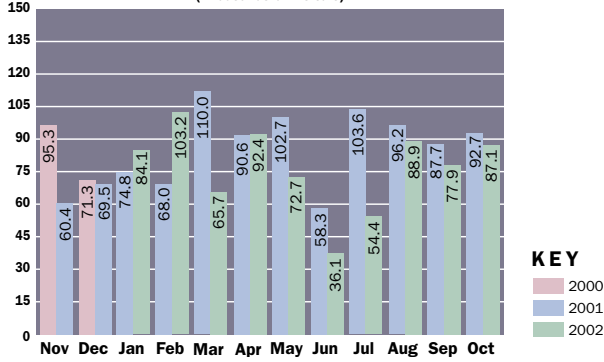
**Channel Islands National Park**

(Thousands of Visitors)



**Death Valley National Park**

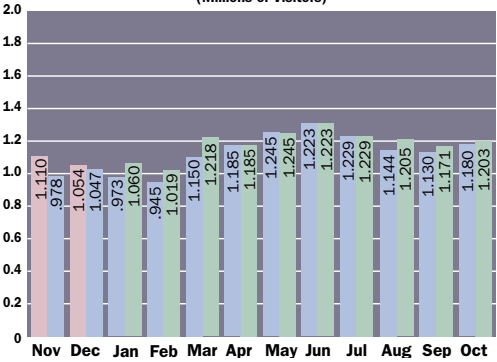
(Thousands of Visitors)



**KEY**  
2000  
2001  
2002

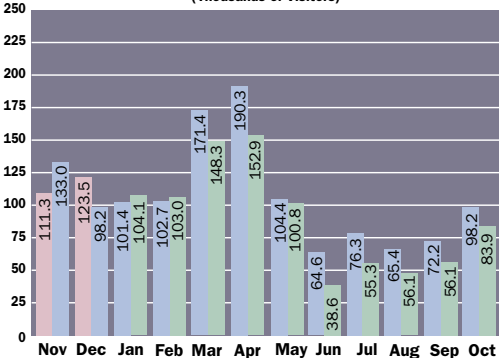
**Golden Gate National Recreation Area**

(Millions of Visitors)



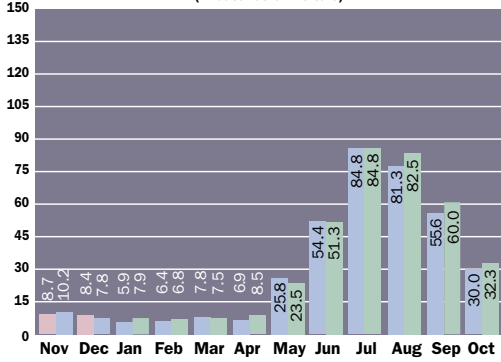
**Joshua Tree National Park**

(Thousands of Visitors)



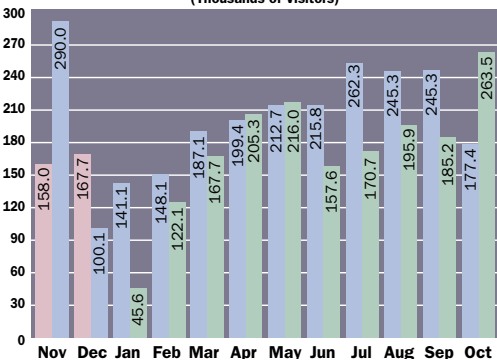
**Lassen Volcanic National Park**

(Thousands of Visitors)



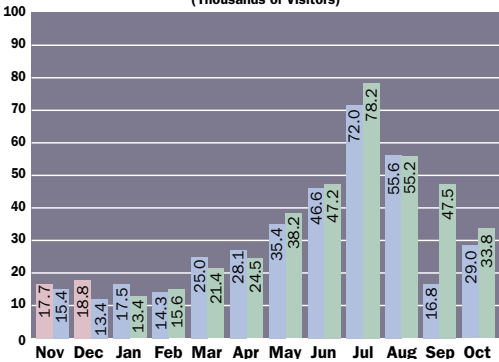
**Pt. Reyes National Seashore**

(Thousands of Visitors)



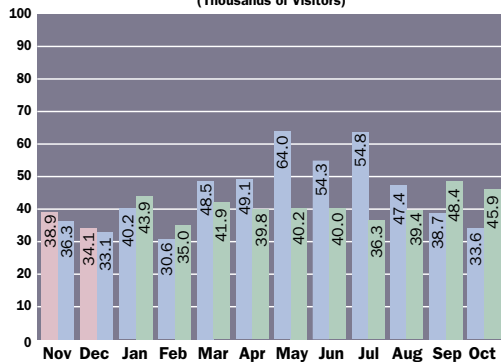
**Redwood National Park**

(Thousands of Visitors)



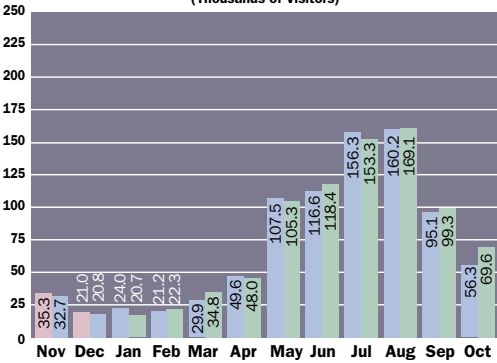
**Santa Monica National Recreation Area**

(Thousands of Visitors)



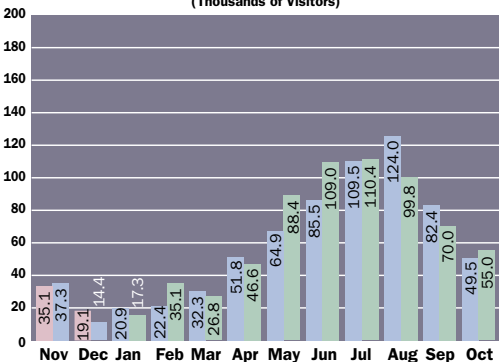
**Sequoia National Park**

(Thousands of Visitors)



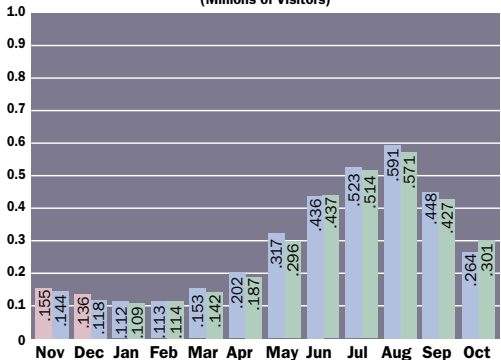
**Whiskeytown-Shasta-Trinity National Recreation Area**

(Thousands of Visitors)



**Yosemite National Park**

(Millions of Visitors)







# Here & There

## Travel Agent User Profile

A survey conducted by NFO Plog Research shows that travel agent users take almost three times as many air trips as non-users. They are also more likely to take part in activities of almost every kind on their vacations. These travelers are more likely to shop, enjoy fine dining, visit a casino and attend a nightclub or stage show. An agent who is knowledgeable about their patrons' interests and the options available in the chosen destination can steer the client in the direction of a memorable vacation.



South Coast Plaza

A recent survey shows travel agents' clients are more inclined to shop at a destination than non-agent users.

### Travel Activities on Vacation Travel Agent Users vs. Non-Users<sup>1</sup>

Activity	Users	Non-Users
Shopping	67%	58%
Visiting historic sites/churches	44%	33%
Fine dining	47%	31%
Visiting museums/art galleries	34%	24%
Visiting casino/gambling	34%	21%
Nightclub/stage shows	24%	13%
Theater/drama	17%	9%
Golf	12%	8%
Wine tasting/winery tour	11%	7%
Snorkeling	11%	3%

## Packaged Travel Increases

The National Tour Association (NTA) recently released the results of its 2001 *Packaged Travel in North America* study. The study, conducted by Dean Runyan Associates and Longwoods International, was mailed to roughly 57,000 households in the U.S. and Canada, and then narrowed down to respondents who had experienced a travel package. For this study, a travel package is defined as a trip arranged by a travel professional that includes at least two travel elements, such as

transportation and accommodations. Packaged travelers may travel independently or as part of a group.<sup>2</sup>

According to the study, within the U.S., packaged leisure travel expenditures rose to \$76.2 billion in 2001, a 6 percent increase over the previous year. The same study showed that half of independent packaged travelers and 29 percent of group packaged travelers booked their trips through a travel agent. Group travelers are more likely to book their trip through a tour company (34 percent) than independent packaged travelers (15 percent).<sup>3</sup>

## Agents and Clients Online

Travel agents' clients are often more educated about where they want to go than in the past. The immense amount of destination information, coupled with packages, discounted rates and more on the Internet means travelers can come into an agency either sure of their objective or confused by so many options.

Travel agents are surfing the Web looking for information, too. Agency owner-managers are spending an average of 14 hours a week roaming the Internet, while the frontline agents are online about 10.5 hours a week.<sup>4</sup>

The travel agent must act as an extremely well informed counselor, providing the client with the pluses and minuses of their choices. Agents who specialize in a geographic region or a particular travel niche have a leg up on their competitors when they advise a client. ★

<sup>1</sup> Excerpts from "Travel Agent Users versus Non-Users, Highlights," NFO Plog Research's 2002 American Traveler Survey, *Travel Weekly* 2002 U.S. Travel Industry Survey, October 21, 2002, Supplement.

<sup>2</sup> "Good News in Bad Times," *Travel Agent*, December 2, 2002, p. 70

<sup>3</sup> "NTA Reveals Key Findings on Packaged Travel in North America," *Travel Agent*, November 18, 2002, p. 18.

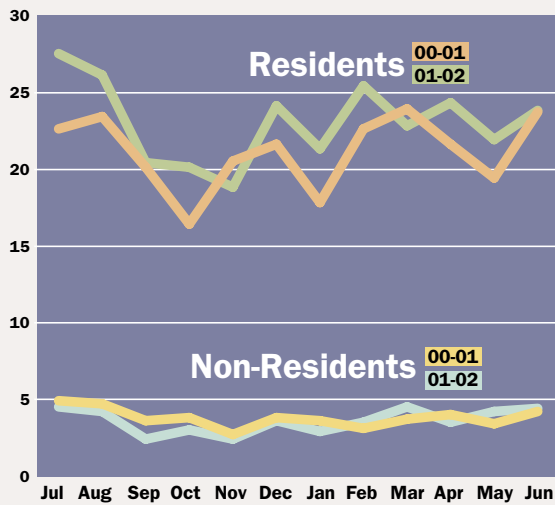
<sup>4</sup> "Agency Technology, Bookings Shifting from GDSs to the Internet," by Jim Glab, *Travel Weekly* 2002 U.S. Travel Industry Survey, October 21, 2002, p. 172.

## Defining Moment:

**A person-trip is one person traveling more than 50 miles from their home for purposes other than going to work or to school.**

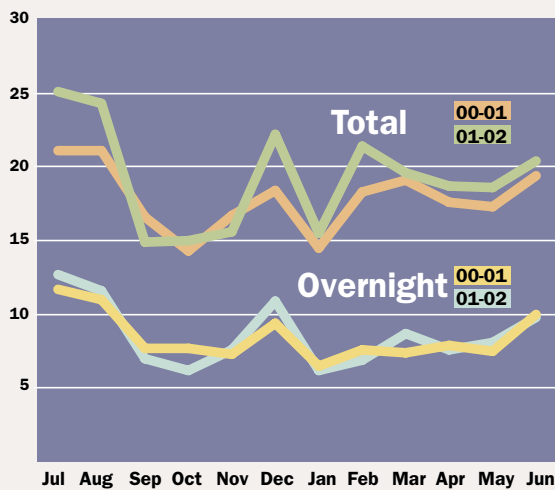
## Domestic Travel To And Through California

(Millions of Person Trips)



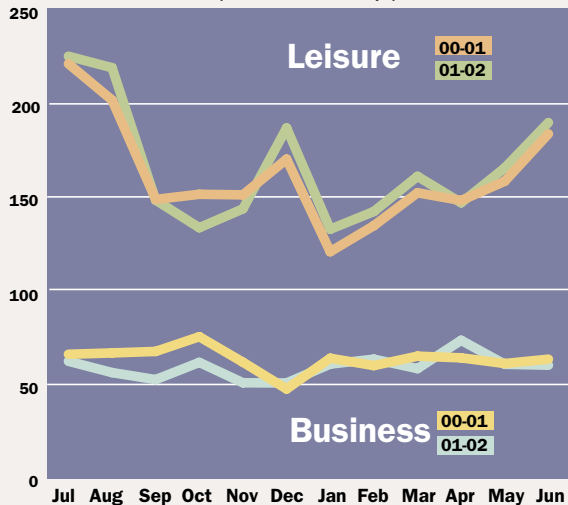
## Domestic Leisure Travel To And Through California

(Millions of Person Trips)



## Domestic Travel To And Through the U.S.

(Millions of Person Trips)



Source: D.K. Shifflet & Associates



## Lodging Report

Location	Month of October		October Year to Date	
	Occupancy % change 2001:2002	Avg. Room Rate	Occupancy % change 2001:2002	Avg. Room Rate
United States	4.7%	3.0%	-1.4%	-2.2%
Pacific	8.9%	1.8%	-2.6%	-4.4%
California	7.6%	1.5%	-3.7%	-4.7%
California North	1.4%	3.5%	0.0%	1.7%
California North Area	4.1%	-1.9%	3.1%	0.5%
California North/Central	1.1%	2.8%	-1.1%	-1.6%
California South/Central	3.1%	2.6%	1.6%	2.6%
Anaheim-Santa Ana	14.9%	2.4%	-4.7%	-2.7%
Bakersfield	-1.6%	0.1%	-2.8%	1.0%
Eureka/Crescent City	5.0%	0.6%	0.7%	2.0%
Fresno	6.5%	4.5%	2.4%	3.9%
Inyo/Kings/Tulare	6.7%	3.7%	8.2%	2.1%
Los Angeles-Long Beach	14.8%	3.8%	-3.8%	-2.5%
Oakland	-3.9%	-2.9%	-12.0%	-7.4%
Oxnard/Ventura	-0.2%	3.9%	-0.1%	3.0%
Palm Springs	1.3%	-2.8%	-0.3%	-4.8%
Redding/Chico	4.1%	5.9%	3.9%	4.5%
Riverside-San Bernardino	2.9%	3.0%	0.7%	1.6%
Sacramento	4.1%	0.1%	-1.7%	0.0%
Salinas/Monterey	-1.0%	-3.8%	-0.6%	-0.8%
San Diego	5.2%	5.0%	-1.7%	-0.3%
San Francisco/San Mateo	18.1%	-4.2%	-7.4%	-13.7%
San Jose-Santa Cruz	1.9%	-5.4%	-9.2%	-16.0%
San Luis Obispo	-0.8%	3.4%	-1.6%	5.6%
Santa Barbara/Santa Maria	-2.0%	4.8%	-1.9%	3.9%
Santa Rosa-Petaluma	-3.1%	6.0%	-7.8%	1.8%
Stockton Area	2.4%	1.2%	-3.6%	-0.6%
Vallejo-Fairfield-Napa	-2.2%	5.4%	-1.2%	2.4%

Source: Smith Travel Research



## Comparison of State Park Attendance by Areas/Type of Parks

1999/2000 fiscal year  
2000/2001 fiscal year  
2001/2002 fiscal year  
2002/2003 fiscal year

Area/Type of Park	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.
Redwood Parks	809,676	320,184	237,064	608,802
	948,643	325,064	256,660	637,411
	979,371	302,019	266,758	771,900
	1,391,234			
Sacramento Area State Parks	295,312	230,845	308,328	494,902
	336,372	305,720	290,407	464,515
	311,311	208,584	325,942	513,645
	308,098			
Lake Tahoe Area	533,688	134,454	52,947	198,514
	598,591	53,337	66,977	306,671
	608,748	105,423	53,914	257,972
	522,236			
Gold Country State Parks	240,801	163,945	128,063	329,091
	235,441	158,682	133,321	326,925
	274,281	247,318	179,003	353,815
	369,514			
Santa Cruz - Monterey Area	1,285,717	925,278	701,805	1,091,542
	1,379,006	1,091,621	860,197	1,122,992
	677,737	826,852	877,330	983,158
	1,376,407			
San Francisco Area	1,471,309	622,211	702,295	1,426,563
	1,257,251	761,258	616,507	1,393,093
	1,225,941	815,182	1,280,132	1,358,032
	1,124,934			
Southern California Beaches	5,753,449	2,198,426	1,762,522	3,618,737
	6,249,873	2,568,349	2,522,680	5,574,456
	7,559,921	2,748,779	2,732,597	4,817,294
	9,450,728			
Desert State Parks	84,511	223,883	289,977	187,571
	130,052	265,020	350,809	377,076
	110,515	281,816	400,900	213,638
	109,974			

Source: California State Parks



# Research Round-up

## Travel Industry Association of America

### *Japan Travel View: Attitudes & Trends, 2002 Edition*

The Japanese market has long been the most lucrative inbound market to the U.S. This publication examines Japanese travel, while also providing an overview of the social, political and economic conditions that affect travel, and contains the profile information needed to target this market. Cost: Members: \$300; Non-members: \$495.

### *Tourism Works for America, 11th Annual Edition 2002*

This invaluable resource will help you promote a wider understanding of travel and tourism as a major U.S. industry that is vital to the economy

and contributes to cultural and social well-being. New in this edition is information about agri-tourism, and a new section on the U.S. travel outlook and forecast. Cost: Single copy: \$15; bulk prices available for 25 to 100 copies.

For further information, contact *Travel Industry Association of America* (TIA) – 1100 New York, NW, Suite 450, Washington, D.C. 20005-3934 Web site: [www.tia.org](http://www.tia.org) Tel: (202) 408-8422 Fax: (202) 408-1255

## Packaged Facts

### *The Gay and Lesbian Market: New Trends, New Opportunities*

Learn what the 2000 Census revealed about where gay men and lesbians are most likely to live, gain expert insight

and recommendations for expanding marketing opportunities, and discover how new trends are driving consumer demand. Features comprehensive data and market insight from Witeck-Combs Communications, a major public relations firm. Cost: \$3,000.

### *The U.S. Baby Boomer Market*

This report provides key data and analysis for this complex, high-income group of consumers: what they like, how they spend their money, and what messages appeal to them. Cost: \$3,000

For further information, contact Packaged Facts, c/o MarketResearch.com, 641 Avenue of the Americas, 4th Floor, New York, New York 10011-2002

Web site: [www.MarketResearch.com](http://www.MarketResearch.com)  
Tel: (800) 298-5294  
Fax (212) 807-2642

## Demographics USA 2002

### *Demographics USA 2002: County Edition*

More than 1,500 pages of demographic, economic, and commercial/industrial estimates. Includes population, household and income variables for more than 3,000 counties. Consumer buying power, employment data, retail sales, and five-year projections are in this comprehensive resource. Cost: Directory and CD-ROM: \$995.

### *Demographics USA 2002: ZIP Code Edition*

Provides 50 variables for over 40,000 ZIP codes, including effective buying income, retail sales, data summaries, and projections. Cost: Directory and CD-ROM: \$995.

These two publications and CD-ROMs can be purchased together for \$1,495.

For further information, contact: Demographics USA 2002, 45 Danbury Road, Wilton, CT 06897. Web site: [www.TradeDimensions.com](http://www.TradeDimensions.com) Tel: (203) 563-3100 Fax: (203) 563-3131

## California Welcome Centers (CWC) Percent Change in Number of Visitors

	OCT-02	OCT-01	% chg.	YTD '02	YTD '01	% chg.
CWC, Anderson	2,538	2,859	-11.2%	31,920	32,078	-0.5%
CWC, Arcata	1,411	1,236	14.2%	15,727	13,954	12.7%
CWC, Barstow	7,954	5,333	49.1%	71,702	65,609	9.3%
CWC, Los Angeles	5,149	1,214	324.1%	53,275	17,055	212.4%
CWC, Merced	3,424	2,418	41.6%	33,079	29,945	10.5%
CWC, Oceanside	4,339	2,647	63.9%	59,937	46,407	29.2%
CWC, PIER 39	25,118	22,223	13.0%	313,412	298,952	4.8%
CWC, Rohnert Park	2,577	1,537	67.7%	23,710	15,032	57.7%
CWC, Santa Ana*	5,310	n/a	n/a	56,619	n/a	n/a
CWC, Yucca Valley**	618	n/a	n/a	7,301	n/a	n/a

## California Visitor Centers Percent Change in Number of Visitors

	OCT-02	OCT-01	% chg.	YTD '02	YTD '01	% chg.
Death Valley	1,450	1,693	-14.4%	17,219	21,661	-20.5%
Los Angeles	6,936	9,276	-25.2%	44,116	102,991	-57.2%
Monterey	13,264	12,971	2.3%	166,808	196,578	-15.1%
Sacramento	1,489	2,573	-42.1%	25,046	n/a	n/a
San Diego	3,239	3,272	-1.0%	35,923	39,568	-9.2%
San Francisco	33,927	31,351	8.2%	326,860	476,697	-31.4%
Santa Barbara	19,492	18,727	4.1%	234,487	224,864	4.3%

\* = opened November 29, 2001 \*\* = opened May 2, 2002

Sources: Calif. Welcome Center, Anderson; Calif. Welcome Center, Arcata; Calif. Welcome Center, Barstow; Calif. Welcome Center, Beverley Center; Death Valley Chamber of Commerce; Los Angeles Convention & Visitors Bureau; Calif. Welcome Center, Merced; Monterey Peninsula Visitors & Convention Bureau; Calif. Welcome Center, Oceanside; Calif. Welcome Center, PIER 39; Calif. Welcome Center, Rohnert Park; Sacramento Convention & Visitors Bureau; San Diego Convention & Visitors Bureau; San Francisco Convention & Visitors Bureau; Calif. Welcome Center, Santa Ana; Santa Barbara Convention & Visitors Bureau; Calif. Welcome Center, Yucca Valley.

## Did You Know?

In 2001, California's 317 million visitors were responsible for \$75.4 billion in tourism spending.



- ☐ **1. California Fast Facts 2002** .....FREE  
The most frequently requested facts and figures on California tourism, statewide and regional.
- ☐ **2. California Travel Impacts by County, 1992-2000** ..... ☐ One copy (FREE) ☐ \_\_\_ Add'l copies .....@ \$7.00 ea.  
2000 expenditures, payroll, employment and tax receipts for every California county, plus preliminary  
2001 statewide figures. 100+ pages.
- ☐ **3. Domestic Travel to California, 2001** ..... \$7.00  
Complete market profiles and visitor origins for 2000. Full report 130 pages.
- ☐ **4. Pre-Post 9/11 Travel in the United States and California**.....FREE  
Evaluation of the impact the events of September 11, 2001 had on travel in the U.S. and California.
- ☐ **5. California County Travel Report, 1999 - 2000** .....FREE  
Profiles of the average visitor to California by county, includes trend numbers for 2000.
- ☐ **6. Overseas Visitors to California, 2000**..... \$3.00  
Traveler and trip characteristics of key overseas markets. 75+ pages.
- ☐ **7. 2001 Advertising and Fulfillment Impact Study** .....FREE  
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- ☐ **8. Sources of Research Statistics** .....FREE  
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- ☐ **9. Local Visitor Impact Model**.....FREE  
Steps and sample survey forms for a do-it-yourself visitor profile and impact study. 127 pages.
- ☐ **10. 2001 Annual Report**.....FREE  
Annual report to the Legislature of the activities and programs of the Division of Tourism.
- ☐ **11. 1999 California Heritage Traveler Profile**.....FREE  
Profile of California travelers who participate in heritage related activities. 1999 domestic travel data.
- ☐ **12. Campers in California** .....FREE  
Travel Patterns and Economic Impacts of Campers at both public and private campgrounds, 1999/2000.
- ☐ **13. Insights** ☐ Sample copy only .....FREE  
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# California Events Make “Top 100”



**Chosen from among hundreds of nominated events throughout the United States and Canada, two California events made the American Bus Association’s (ABA) Top 100 Events in North America list for 2003: The Rolex Monterey Historical Automobile Races in Monterey and Lone Pine Film Festival in Lone Pine.**

Often described as a kinetic museum and the world’s premier historic motoring event, the Monterey Historical Automobile Races are a blend of colorful sights, engine revs and high octane. While racing legends and notable personalities attend, the 375-plus cars are the true stars of the weekend. Winning is not the primary objective for entrants, but these drivers are not out for a leisurely afternoon drive. Pre-war cars like the 1909 Lozier Briarcliff are capable of 100 mph speeds, while historic Ford GT-40s and Porsche 908s rocket through the course averaging 80 to 100 mph. Car owners have the opportunity to share their piece of history with motoring enthusiasts and the next generation’s race fans. The 2003 races rev up August 15-17.

Celebrating Lone Pine’s 80-year film history, the Lone Pine Film Festival includes a golf tournament, concert, tours of film sites and continuous movie showings. Panels of celebrities are scheduled throughout the weekend, while the Town Hall features memorabilia and autograph sessions. Also on tap is a showing of a classic Lone Pine film (with its stars in attendance), a parade and barbecue dinner. An arts and crafts fair fills the local park, and the weekend closes with a traditional campfire. The 2003 festival will take place October 10-12.

The ABA annually selects 100 events in the United States and Canada for its prestigious list containing festivals, exhibitions, fairs, and sporting

events. Travel professionals base their selections on an event’s broad appeal, accessibility, receptivity to large groups arriving by motorcoach, and a variety of other criteria.

Single copies of the 20-page color booklet listing the 2003 *Top 100 Events in North America* are available by contacting the American Bus Association at [abainfo@buses.org](mailto:abainfo@buses.org). ★



Kyle Burt

**Start your engines!** A 1964 Cobra is just one example of many exciting cars that draw visitors to this top-ranked California event.

## Internet Marketing Primer

*continued from page 1*

added in about a week, but some (like [dmoz.org](http://dmoz.org) which commonly takes months to be added) do not charge a fee.

In a **Search Index** there is no directory structure to deal with, all of the Web sites end up in the same place, and you find those pages containing your search term by having a search engine locate all the pages with your words in them. So if there are over 700,000 Web sites about “California Tourism” out of the 3 billion known sites, the search tool will find them all, sort them by which sites are the most relevant to California Tourism, and present a long list of matching sites in just seconds. The order of the results is usually determined by relevancy (Google analyzes over 100 variables), so it is a complex task to get your site near the top of the list. There is an

entire industry of firms like ours that focus on Search Engine Optimization (SEO), and a myriad of informational sites to help you to do your own project. The average SEO project can take several months before meaningful results are seen.

There is a third option, the **Pay-per-Click** search index. This operates in a manner similar to a search index for the identification of the site lists, but the results are sorted by who will pay the most to be at the top of the list instead of which page is the most relevant to the search. What this allows the site owner to do is to “buy” a top ranked position for a search term in an auction-like bidding process that runs non-stop. Whatever page has the highest bid at the time of the search wins the top position in the results. All you need to do is be willing to pay more than the next site owner. The good thing is you only

pay when someone visits your site, not when they search, so there is no fee if there is no traffic. To have your site ranked with a Pay-per-Click engine is the easiest and fastest (and usually the most expensive) of the three search engine options.

A word to the wise – design your Web site to focus on very specific search terms by using geographic focus in your area of expertise. Otherwise you will be competing with the larger Web portals like Travelocity or Expedia for general travel-related keywords. But remember, on the Web, “location, location, location” is spelled “s-e-a-r-c-h e-n-g-i-n-e.” ★

*For further information on search engines, how to promote your Web site and more, visit Clay’s Web site at [www.bruceclay.com](http://www.bruceclay.com) --a top-ranked site containing a wealth of free advice on how to succeed on the Web.*

# Bound For *Berlin*

California Tourism will again organize a stand presence at International Tourism Exchange Boerse (ITB) March 7-12, 2003.

With more than 50,000 trade and consumers attending, ITB is considered the largest travel exhibition in the world. Participants will have the opportunity to meet with German and European travel trade and media as part of the extensive SeeAmerica Pavilion.

The cost of \$2,700 to attend includes: space at the California stand; support of the Germany travel trade office, including solicitation for appointments from the German travel trade; brochure shipping; all exhibitor fees, client reception and more. Participants will also have access to United Airlines' fixed price zone fares to any European gateway they serve. For more information contact Terry Selk at [tselk@commerce.ca.gov](mailto:tselk@commerce.ca.gov) or (916) 322-0971. ★



# Travel Trade Calendar

## February

15-20	Borse Italian Travel (BIT)	Milan, Italy
16-20	California Travel Market (CTM)	Hollywood & San Diego North County
17-19	Expo Vacaciones	Mexico City, Mexico
17-19	Conference Exhibition (CONFEX)	London, England
26	California Travel & Tourism Commission Marketing Committee Meeting	Monterey, CA
27	California Travel & Tourism Commission Executive Committee Meeting General Commission Meeting	Monterey, CA

## March

7-11	International Tourism Exchange Boerse (ITB)	Berlin, Germany
20-23	TUR (Turistmassen)	Gothenburg, Sweden
23-27	California Conference on Tourism	San Diego, CA
26-30	2003 NTA Tour Operator Spring Meet	Victoria, B.C.
31- April 2	California Travel Parks Association (CTPA) Annual Conference	Reno, NV

## April

8-10	International Meetings Exhibition (IMEX)	Frankfurt, Germany
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## INSIGHTS

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**Lon Hatamiya**, Secretary

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& Tourism Commission

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